Gates Foundation Opportunity Online Hardware Grants

Frequently Asked Questions[1]
(October 17, 2008)

In 2007 the Bill & Melinda Gates Foundation launched the Opportunity Online Hardware grant program. This grant is being implemented in states nationwide over a period of several years. Wisconsin—along with eight other states—is in the final round, which begins in 2009. The Opportunity Online Hardware grant is part of a series of library grants the foundation has funded since the late 1990s. A primary goal of these grants is to help public libraries sustain free access to computers and the Internet for people who need it most. Libraries that are awarded grants in this latest program can use the grant funds to pay for public access PCs and related costs of installation and support. The grants funds will be distributed in 2010 and 2011.The foundation anticipates that this will be its last round of PC hardware grants.

This FAQ is linked to the DPI's grant Website at http://dpi.wi.gov/pld/gatespcgrant.html. If you have any questions, contact Bob Bocher, Technology Consultant, Division for Libraries, Technology, and Community Learning, 608-266-2127, robert.bocher@dpi.wi.gov.

General Information, Eligibility, Time frame

1Q: What are the primary goals of the Opportunity Online hardware grants?
1A: The primary goals of the grant program are (1) to help ensure that public libraries serving areas of high poverty have a sufficient number of up-to-date PCs to meet patron demand and (2) to help ensure long-term sustainability so that libraries can continue to offer free use of computers and Internet access for their patrons.

Q: What is the role of the Division for Libraries, Technology, and Community Learning and the role of the state's regional library systems in this grant?

A: The division is the grant administrator. It is responsible for working with foundation staff to ensure that the grant is implemented in a manner acceptable to the foundation and that libraries meet the grant requirements. The division files required reports with the foundation and serves as the communication conduit between the foundation, eligible libraries and the state's regional library systems.

The role of the state's regional library systems varies. For example, some systems will run the TechAtlas PC inventory program for their member libraries (see below). Some systems will purchase and install the PCs for their eligible libraries. Eligible libraries will be contacted by their system regarding what role the system will have in the Opportunity Online hardware grant program.

Q: How will I know if my library will receive any PCs from the Opportunity Online hardware grant?

A: The Opportunity Online hardware program will pay for public access PCs for libraries that pass two basic eligibility requirements established by the foundation.
1. Poverty: Libraries must serve a population above 10% poverty or have more than 3,000 people in poverty, based on 2000 census data. This condition also factors in a foundation-defined library service area. Libraries that fail to meet this eligibility requirement cannot

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[1] Parts of this FAQ include information provided by the Bill & Melinda Gates Foundation.

participate in the program and thus need not be concerned about the second eligibility requirement.

2. PC service level: Libraries must have at least some pubic access PCs that are more than four years old and they must have a sufficient number of PCs as defined by the foundation. This service level eligibility is determined by the library running the Tech Atlas PC inventory program.

A library must meet the above two eligibility requirements. For example, a library that qualifies based on its poverty but that has a sufficient number of PCs less than four years old will not receive a grant. (Libraries that meet the poverty requirement and are considering the purchase of PCs should take note of this fact.) An Excel file of libraries that the foundation has determined meet the poverty level requirement has been linked to the division's Opportunity Online grant Website at http://dpi.wi.gov/pld/gatespcgrant.html. There is no appeal process for libraries not eligible.

Q: In addition to the two eligibility requirements, are there other requirements for participating in the grant?
A: Yes. Other requirements include the following:

3. Libraries must commit to provide PC matching funds over the two-year term of the grant (25% in 2010; 50% in 2011).
4. Libraries must run the TechAtlas inventory program. The foundation uses the data from this inventory to determine the age of a library's PCs.
5. Libraries must participate in a two-day Public Library Association (PLA) advocacy symposium titled *Turning the Page*. This will likely be in fall 2009, and all expenses will be paid by PLA.
6. Libraries must complete the annual ALA Public Library Funding and Technology Access survey in the fall of 2009, 2010, and 2011.

All of these requirements are explained in more detail below.

Q: My library received PCs from the foundation's earlier hardware program in 2002, but it is not eligible to receive PCs as part of the current Opportunity Online hardware grant program. Why?
A: This is a different grant program with different criteria than the earlier program. For example, the 2002 grant used poverty data from 1997 because poverty data from the 2000 national census had not yet been finalized. From 1997 to 2000 the nation had steady economic growth. Thus some communities that had a poverty level above 10% in 1997 had a poverty figure below 10% in 2000 and therefore do not qualify for the current grant.

Q: What are the immediate actions that I need to take in the next several months?
A: Libraries that meet the poverty requirement must run the TechAtlas PC inventory program to determine whether they meet the second requirement referenced above. This must be completed by December 31, 2008. ***Note:*** *Failure to complete the TechAtlas inventory will disqualify a library from the grant.* For more details, see the TechAtlas section below.

Q: What is the time frame for the various grant activities?
A: The following is a basic timeline. Some dates are estimates and may change as the grant is implemented.

2008	Activity/Action
October 13-24	Poverty eligibility finalized by the foundation and sent to the division. Division and systems then notify poverty eligible libraries.
October 17-31	Division works with systems and TechAtlas to establish library accounts. Systems notify their libraries if system staff will run the TechAtlas PC inventory program for each eligible library.
November 1	*Library action:* TechAtlas inventories can begin. (For many libraries, this will be done by system staff.)
December 31	*Library action:* TechAtlas inventories must be completed. ***Note:*** *Failure to complete the inventory will disqualify a library from the grant.*
2009	
January–February	Foundation uses TechAtlas data to determine final library eligibility.
March 2	Foundation notifies division of final library eligibility. Division then notifies libraries of the number of PCs they will be eligible to receive and the amount of the required local library match.
March 2–March 27	*Library action:* Libraries decide whether they want to participate.
March 27	*Library action:* The division must have a commitment letter from the director of each participating library.
April 24	Division sends foundation statewide grant application which includes all participating libraries, a detailed budget, etc.
July	Foundation awards year 1 (2010) grant funds to the division.
September–October	*Library action:* Library staff complete ALA Public Library Funding and Technology Access survey.
Fall	*Library action:* Library staff must attend PLA Advocacy Symposium.
2010	
January 31	*Library action:* Libraries verify the 25% match to the division.
February–April	Division confirms match and disburses funds to libraries. Libraries (or systems) purchase and install PCs.
July	Foundation awards year 2 (2011) grant funds to the division.
July–September	*Library action:* Libraries run TechAtlas.
September–October	*Library action:* Library staff complete ALA Public Library Funding and Technology Access survey.
November 1	Division submits Year 1 report to the foundation.
2011	
January 31	*Library action:* Libraries verify the 50% match to the division.
February–April	Division confirms match and disburses funds to libraries. Libraries (or systems) purchase and install PCs.
July–September	*Library action:* Libraries run TechAtlas.
September–October	*Library action:* Library staff complete ALA Survey of Public Library Funding and Technology Access.
November 1	Division submits Year 2 report to the foundation.

Defining and Purchasing Eligible PCs

Q: What is the definition of a public access PC?
A: For this program, a "public access computer" is a computer or PC available to the public. Internet access is desired but not required. Staff PCs and PCs that have access limited to the library's online catalog are not defined as "public access computers."

Q: How many computers will be funded for libraries receiving grants?
A: Libraries in communities under 5,000 population will be eligible to purchase 2-3 PCs while some larger libraries in communities over 20,000 population will likely be eligible for 8-12 PCs or more. These numbers are approximate. The actual number of PCs is determined by the foundation. It is based on the age of a library's PCs and how many up-to-date public access PCs the foundation believes a library should have.

- Example 1: If your library has 15 PCs more than four years old but the foundation's defined level of service for a library your size is only 10 PCs, your library will receive funding for 10 PCs.
- Example 2: If your library has 15 PCs and all of them are more than four years old but the foundation's level of service for a library your size is 20 PCs, your library will receive funding for 20 PCs.
- Example 3: If your library has 15 PCs and 10 are more than four years old and 5 are newer, and the foundation's level of service for a library your size is 15 PCs, your library will receive funding for 10 PCs.

The foundation will notify the division of the exact number of PCs each library will be eligible to receive on March 2, 2009. The grant will award approximately $1,600 per PC. This amount will vary somewhat depending on the number of PCs a library is eligible to receive and whether it is the first or second year of the grant. With the required local funding match, the cost per PC is $2,600.

Q: Can I purchase any model or type of PC with the grant funds?
A: Yes. In the initial round of foundation hardware grants in 2002, the foundation granted preconfigured Gateway PCs to eligible libraries. In the 2009 grant program, libraries can purchase any PCs of their choice with whatever configuration and software they want. This includes desktop or laptop PCs. ***Note:*** The division strongly encourages libraries to work closely with their systems on purchasing PCs. Some systems will want to coordinate the purchase process or have some oversight to ensure a standard PC configuration. Some systems will also install the PCs.

Q: Most PCs cost less than the approximately $1,600 granted per PC. What can any extra funding be used for and what is not permitted?
A: Other eligible uses of the grant funds: The funding is intended also to cover installation and any ongoing training and technical support needed to keep the computer in proper working order. Purchasing of software, printers, and scanners is another eligible use of the grant funds. A library may also use the funds to support the library's network infrastructure (e.g., servers, switches, routers, etc.) or to purchase additional PCs. Systems that assist their member libraries can require that some of the funding be allocated to the system for installation, configuration, and support. Libraries should contact their system regarding any possible use of the grant funds by the system.

Ineligible uses of the grant funds: Replacing or upgrading staff-only PCs is not permitted. Funds also cannot be used for increasing Internet bandwidth, paying for ongoing Internet costs, or purchasing MP3 players or gaming systems. Funds cannot be used for nontechnology

purchases such as furniture or for any staffing costs beyond direct support of the purchased PCs. If you have any questions on the use of any extra funds, contact the division.

Library Grant Requirements: The Local Library Match

Q: Why is there a match requirement?
A: The Opportunity Online hardware grants are designed to help public libraries sustain their technology and strengthen their capacity to conduct advocacy and secure ongoing support for technology-related services. The matching requirement provides an incentive for libraries to engage their community to raise funds and communicate the value of technology in libraries.

Q: What is the match requirement?
A: The grant provides funds to participating libraries in two phases over approximately two years as shown in the table below. The grant requires a 25% match in year one (2010) and a 50% match in year two (2011). The exact time frame of each phase will be determined by the division and may be shorter than a calendar year.

> *Note:* While verification of the first year of the match is not needed until January 31, 2010, the division must submit an application to the foundation by April 24, 2009. The application must list all libraries that will participate in the grant. Therefore, the division needs a written statement from the library director by March 27, 2009, which states (1) that the library will participate in the grant and (2) that the library will make a serious, concerted effort to raise the 25% match by January 2010 and the 50% match by January 2011.

By early March 2009 the foundation will notify the division of how many PCs and how much total funding will be allocated to each library receiving a grant. The funds will then be provided to the division over two years, 2010 - 2011. The table below illustrates how the match is calculated for a library receiving 4 PCs at a total of $2,600 each, including the local match.

Year	PCs awarded	Total value of PCs ($2,600/PC)	Gates grant	Required library match	Match verification deadline
2010	2	$ 5,200	$3,900	$1,300 (25%)	January 31, 2010
2011	2	$ 5,200	$2,600	$2,600 (50%)	January 31, 2011
Total	4	$10,400	$6,500	$3,900	

Based on the projected schedule, the verification that the library has obtained the first year (2010) match will be required by January 31, 2010, and verification for the second year (2011) match will be required by January 31, 2011.

Q: What if a library does not obtain its full 25% or 50% match?
A: If a library does not obtain its 25% match in 2010, it will not receive any grant funds and it will not be eligible to participate in the program in 2011. If a library achieves its 25% match for 2010 but doesn't obtain the 50% match for 2011, it will receive 2010 funds but not 2011 funds.

Q: Can you clarify the issues involving reallocation of funds?
A: The objective of the Opportunity Online hardware grant program is to help increase funding for technology services in public libraries. The library cannot use grant funds to offset existing appropriations. For example, a community cannot shift its funding for public computers in a library to the parks department, knowing that the foundation will be giving the library a grant. Similarly, an individual library cannot shift money originally designated for technology to support

the library's collections. Reallocating funds in such a manner will make participating libraries ineligible for the program.

Q: How will the match be verified and what funds can be used for the match?
A: The division, in cooperation with the library systems, will be responsible for verifying each library's matching funds. Written documentation of the match must be submitted to the division or the system. Acceptable documentation will be either (1) a library board resolution committing the funds or (2) a fund commitment letter from another source such as a library friends group, community foundation, or corporate partner. Federal LSTA funds cannot be used for the match. The division is required to confirm receipt of the match documentation to the foundation in interim and final reports. While it is early in the grant the division recommends that eligible libraries already start to consider where they will obtain the required matching funds. Because libraries have until January 2010 to acquire the first year match, the division hopes that the match will not be a significant financial burden.

Library Grant Requirements: TechAtlas

Q: What is TechAtlas?
A: TechAtlas is a collection of free, Web-based technology planning tools for libraries. These tools are designed to help libraries build a comprehensive technology plan, but they can also be customized or used individually to support specific library technology analysis and development projects. To learn more about these resources, visit the Website at http://www.webjunction.org/techatlas.

Q: What is the TechAtlas computer inventory program?
A: The TechAtlas computer inventory program provides libraries with key data on each of their public access PCs, including the age of the PC. The program collects this information based on the date embedded in the computer's BIOS (Basic Input/Output System). If the PC is more than 4 years old it is considered a candidate for replacement.

Q: Is my library responsible for running the inventory program?
A: Some libraries will be directly responsible for running TechAtlas. In some areas of the state the library system staff will run TechAtlas for their member libraries. Contact your system staff on this issue. The division will work with TechAtlas staff to establish login accounts for libraries and systems.

> **Note:** The TechAtlas computer inventory program must be completed by December 31, 2008. *Failure to complete the inventory will eliminate a library from the grant.*

Q: How will the TechAtlas inventory data from participating libraries be used?
A: The data that are collected as part of the TechAtlas PC inventory will be shared with foundation staff and used to determine eligibility for the grant program. TechAtlas takes security seriously and has developed careful precautions to protect all user information. TechAtlas data will not be shared with any outside entity except the division and participating library systems as allowed in the grant.

Q: If libraries run TechAtlas in the fall of 2008, why do they also have to run TechAtlas in 2010 and 2011?
A: The second and third running of TechAtlas is simply a way for the foundation to verify that participating libraries have installed their PCs in 2010 and 2011.

Library Grant Requirements: PLA Advocacy Symposium

Q: Why is a mandatory advocacy symposium a part of this grant program?
A: The Opportunity Online hardware grants program is focused on helping libraries build capacity to sustain long-term support and funding for their library—specifically, their technology services. The advocacy symposium will help libraries build their understanding of, and ability to conduct, ongoing local advocacy activities needed to sustain that funding.

Q: What are the details of the advocacy symposium?
A: The symposium will be held over a two-day period. It will likely be held in Wisconsin or an adjacent state in the fall of 2009. The division will be working with PLA to determine the exact time and place of the symposium. Alternatively, an online version of the advocacy symposium will also be offered. The live symposium is recommended, but those who are unable to attend may be eligible to participate in the online version. All travel and lodging costs will be covered by PLA. Each grant library can send up to three participants. For libraries sending three people, at least one must be a community partner such as a member of the library board or other influential community member who can speak on behalf of libraries. The symposium will also be offered to nongrantees, although space is limited and priority will be given to grant participants. The foundation will cover registration costs but not travel and lodging for nongrantees.

Library Grant Requirements: The ALA Public Library Funding and Technology Access Survey

Q: What is the ALA Public Library Funding and Technology Access Survey and why are libraries required to complete it?

A: The ALA, with support from the foundation, has conducted a national survey of public library computing access, funding and technology since 2006. The survey builds on previous studies conducted since 1994. This is an important survey. Over the years state library agencies and others have used the findings to inform key stakeholders regarding public access to the Internet. ALA uses the survey results to advocate for the E-rate program and LSTA funding and to support other initiatives through Congressional testimony and other efforts. A high survey response rate is critical for such uses to continue.

For More Information

For more information on the Opportunity Online hardware grant program, visit the grant's Website at http://dpi.wi.gov/pld/gatespcs.html. You may also contact Bob Bocher, Technology Consultant, Division for Libraries, Technology, and Community Learning, 608-266-2127, robert.bocher@dpi.wi.gov; or John DeBacher, Public Library Administration Consultant, 608/266-7270, john.debacher@dpi.wi.gov. For any role your regional library system may have in the grant, contact the system.

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